

Plan  
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2040



# Plan Bay Area 2040 Call for Projects and Needs Assessment CMA/Project Sponsor Training

Partnership Technical Advisory Committee  
May 18, 2015

# PROJECT UPDATE, CALL FOR PROJECTS AND NEEDS ASSESSMENTS

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## PROJECT UPDATE AND CALL FOR PROJECTS

- To allow projects/programs seeking future regional, state, or federal funding through 2040 to be considered for inclusion in the Plan



## TRANSIT OPERATING NEEDS ASSESSMENT

- To provide information for the Plan on projected levels of transit service, operating costs, and revenues for the period through 2040



## TRANSIT CAPITAL NEEDS ASSESSMENT

- To provide information for the Plan on the anticipated needs to maintain the region's transit capital assets



## 2015

May Project Update, Call for Projects, and Needs Assessments released

July 1 Transit Operating and Transit Capital Needs Assessments due to MTC

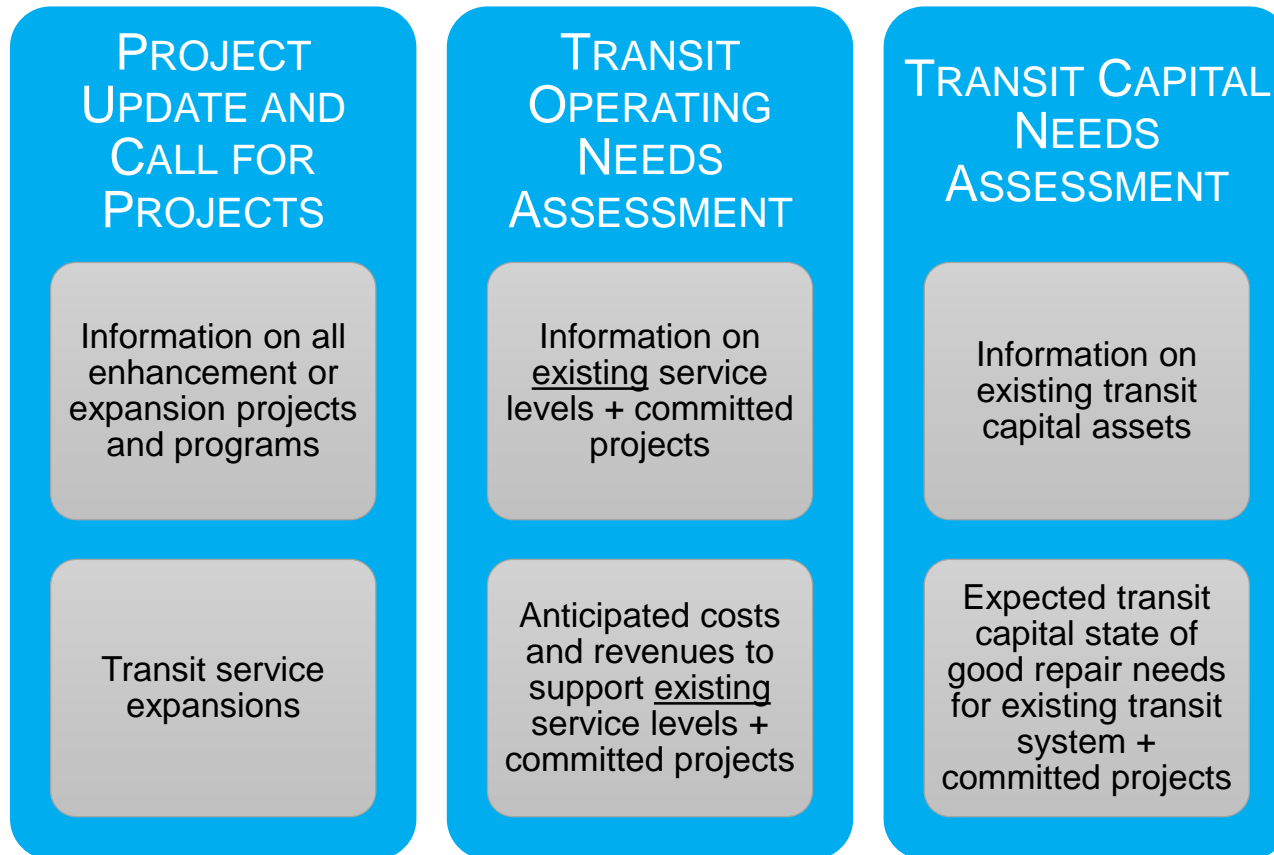
Sept. 30 Project Update and Call for Projects due to MTC

Oct. 31 Resolutions of local support for Call for Projects due to MTC

## 2016

Winter Plan Bay Area 2040 scenario development

# WHICH PROCESS TO SUBMIT TO?



Note: The Local Streets and Roads (LS&R) Needs Assessment is based on data collected through the 2014 California Statewide LS&R Needs Assessment.

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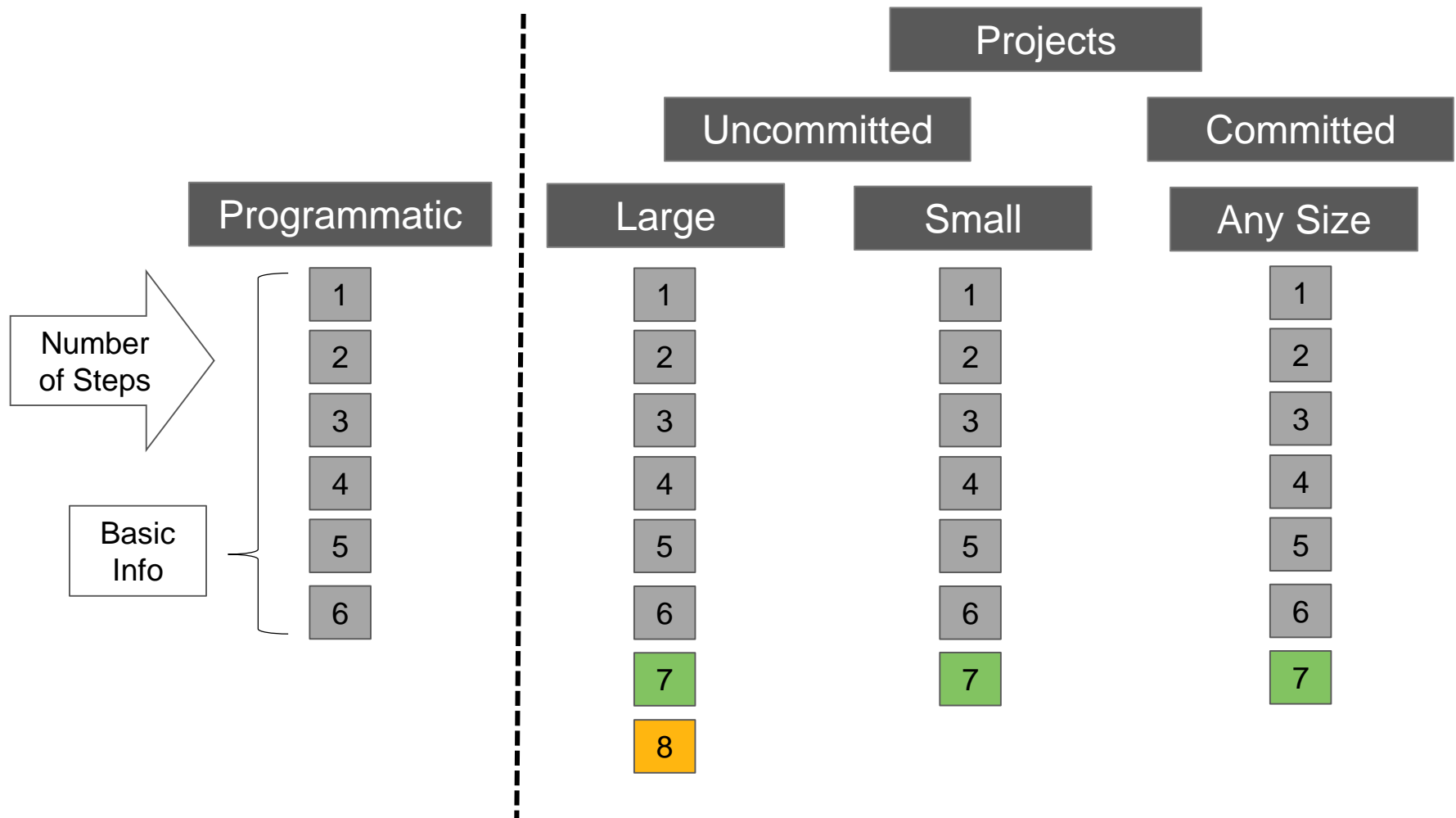


# Plan Bay Area 2040 Database Application

## WHAT IS DIFFERENT?

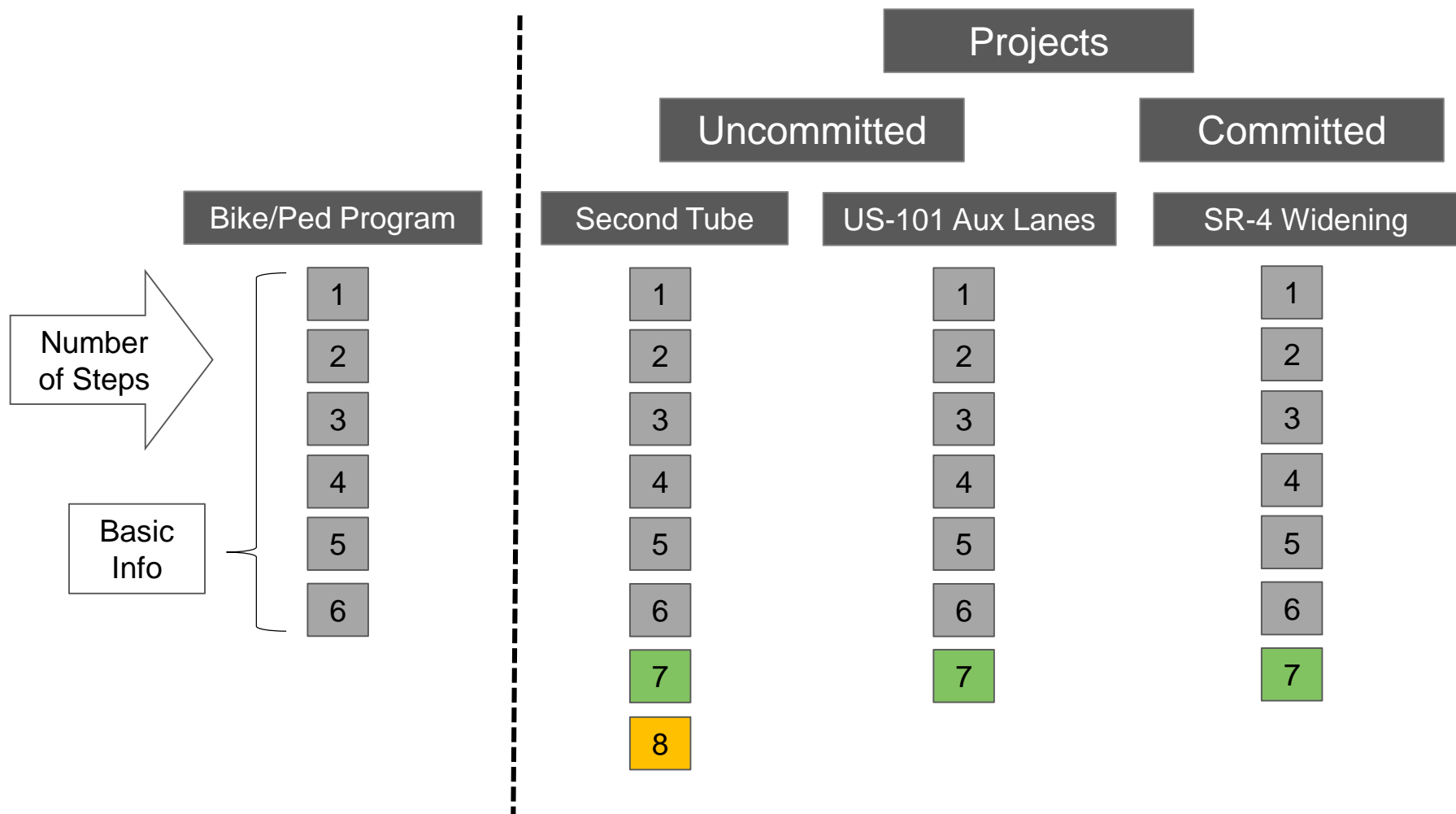
Plan Bay Area Application	Plan Bay Area 2040 Application
<ul style="list-style-type: none"><li>• One size fits all form</li></ul>	<ul style="list-style-type: none"><li>• Application adjusts based on scope</li></ul>
<ul style="list-style-type: none"><li>• Basic form submittal</li></ul>	<ul style="list-style-type: none"><li>• “TurboTax” style wizard</li></ul>
<ul style="list-style-type: none"><li>• Manual bundling of projects into programs</li></ul>	<ul style="list-style-type: none"><li>• Integrated bundling</li></ul>

## DETAILED INFORMATION FOR A SUBSET OF PROJECTS





## DETAILED INFORMATION FOR A SUBSET OF PROJECTS





## INPUT PROCESS - OLD

ID: 240751 Title: Clipper capital replacement costs f...

6 Status  Print  Edit

Basic	Goals & Planning Context	Cost	Funding	Schedule	Modeling	Contact	Detailed Information
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All costs must be reported in 2013\$ M

Total Cost (2013\$ M): ?	\$ 0 M	*
Capital Cost (2013\$ M): ?	\$ 0 M	*
Operations and Maintenance Costs (for Capital) (2013\$ M): ?	\$ 0 M	*

Project Capital Cost Breakdown (in 2013\$ M)				*
	Total Cost (2013\$ M)	% Contingency included in phase ?	% Support Cost included in phase ?	
Environmental:	\$ 0 M	0 %	0 %	
Design:	\$ 0 M	0 %	0 %	
Right-Of-Way Capital:	\$ 0 M	0 %	0 %	
Construction Capital:	\$ 0 M	0 %	0 %	
Transit Procurement (Rolling stock):	\$ 0 M	0 %	0 %	
TOTAL CAPITAL COST: ?	\$ 0 M			

Transit Service Operating Cost (for transit operators only):		*(If Applicable)
This section is to be completed for transit expansion projects proposing new service. Transit operators are REQUIRED to <a href="#">download</a> and complete the form in the section.		
Total Operating and Maintenance Costs (for new transit service) (2013\$ M):	\$ 0 M	
Transit Operations and Maintenance Detail Spreadsheet:	No files	
<a href="#">Template</a>		

## INPUT PROCESS - NEW

### Create Project

1Project Type

2General Information

3Cost & Schedule

4Funding

5Project Manager Contact

6Review

General Information

Title ⓘ

Title

Project Description ⓘ

Please provide a brief description of the project, including location, limits, and scope of work

County ⓘ

Sponsor Agency ⓘ

## INPUT PROCESS - NEW

### Create Project

1

Project Type

2

General Information

3

Cost & Schedule

4

Funding

5

Project Manager Contact

6

Review

Project Type

X

System

Local Road

Project Purpose

Expansion

Project Category

New Bike/Pedestrian Facility

Investment Type

Uncommitted

## INTEGRATED PROJECT BUNDLING

		PROJECT PURPOSE			
TRANSPORTATION SYSTEM		Expansion	System Management	Preservation	Operations
	Local Road	<ul style="list-style-type: none"> <li>• New bike/ped facilities</li> <li>• New/extended roadway (more than ¼ mile)</li> <li>• New lane on existing roadway (more than ¼ mile, includes auxiliary lanes)</li> <li>• New bridge or expanded bridge capacity</li> <li>• Road diet (more than ¼ mile)</li> </ul>	<ul style="list-style-type: none"> <li>• Intersection improvements (less than ¼ mile)</li> <li>• Management systems</li> <li>• Safety and security</li> <li>• Multimodal streetscape improvements (less than ¼ mile)</li> <li>• Travel demand management</li> <li>• Congestion pricing</li> </ul>	<ul style="list-style-type: none"> <li>• Preservation/rehabilitation</li> </ul>	<ul style="list-style-type: none"> <li>• Routine operations and maintenance</li> </ul>
	State Highway	<ul style="list-style-type: none"> <li>• New bike/ped facilities</li> <li>• New/extended highway (more than ¼ mile)</li> <li>• New lane on existing highway (more than ¼ mile, includes auxiliary lanes)</li> <li>• New bridge or expanded bridge capacity</li> <li>• New I/C, I/C modification (with added capacity)</li> </ul>	<ul style="list-style-type: none"> <li>• Management systems</li> <li>• Safety and Security</li> <li>• Minor Highway Improvements (less than ¼ mile)</li> <li>• Travel demand management</li> <li>• I/C modifications (no added capacity)</li> </ul>	<ul style="list-style-type: none"> <li>• Preservation/rehabilitation</li> </ul>	<ul style="list-style-type: none"> <li>• Routine operations and maintenance</li> </ul>
	Public Transit	<ul style="list-style-type: none"> <li>• New/extended fixed guideway (rail, BRT, ferry)</li> <li>• New/expanded station/terminal (including parking facilities)</li> <li>• Fleet/service expansion</li> </ul>	<ul style="list-style-type: none"> <li>• Management systems</li> <li>• Safety and security</li> <li>• Minor transit improvements</li> </ul>	<ul style="list-style-type: none"> <li>• Preservation/rehabilitation</li> </ul>	<ul style="list-style-type: none"> <li>• Routine operations and maintenance</li> </ul>
	Tollway	<ul style="list-style-type: none"> <li>• New/extended toll/express lanes</li> <li>• Lane conversion</li> <li>• New toll bridge</li> </ul>	<ul style="list-style-type: none"> <li>• Management systems</li> <li>• Safety and Security</li> </ul>	<ul style="list-style-type: none"> <li>• Preservation/rehabilitation</li> </ul>	<ul style="list-style-type: none"> <li>• Routine operations and maintenance</li> </ul>
	Freight	<ul style="list-style-type: none"> <li>• New/expanded terminal</li> <li>• New/extended truck lanes (in urban areas)</li> <li>• New trackage</li> </ul>	<ul style="list-style-type: none"> <li>• Minor freight improvements</li> <li>• Safety and security</li> <li>• Track reconfiguration</li> </ul>	<ul style="list-style-type: none"> <li>• Preservation/rehabilitation</li> </ul>	
	Other		<ul style="list-style-type: none"> <li>• Travel demand management</li> <li>• Land use</li> <li>• Planning</li> <li>• Emission reduction technologies</li> </ul>		

\*Project types highlighted in green must be submitted individually, while project types that are not highlighted must be grouped into programmatic categories.

## INTEGRATED PROJECT BUNDLING

### Step 1. Choose a Transportation System, Purpose and Project/Program Type i

Local Road   State Highway   Public Transit   Tollway   Freight   Other

#### Expansion

- ☐ New Bike/Pedestrian Facility
- ☐ New or Extended Roadway/Highway
- ☐ New Lane on Existing Roadway/ Highway (More than 1/4 mile.) i
- ☐ New/ Bridge or Expanded Bridge Capacity
- ☐ Road Diet (More than 1/4 mile)

#### System Management

- ☐ Intersection Improvements i
- ☐ Management Systems i
- ☐ Safety and Security i
- ☐ Multimodal Streetscape Improvements i
- ☐ Travel Demand Management i
- ☐ Pricing Program

#### Preservation

- ☐ Preservation/Rehabilitation i

## APPLICATION PHASES

IMPORT RTPID, TITLE AND  
DESCRIPTION  
CREATE NEW PROJECTS  
SUBMIT PROJECTS



Today!

CMA PROJECT REVIEW  
MTC PROJECT REVIEW



Coming Soon

# Demo

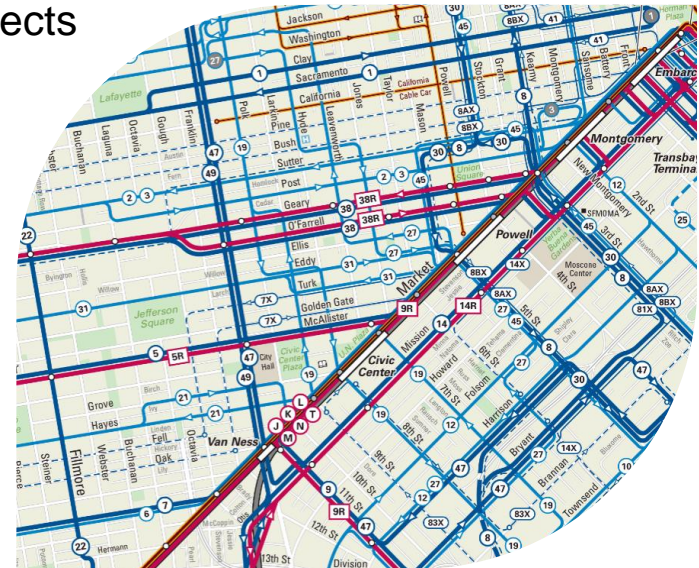


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# Plan Bay Area 2040 Transit Operating Needs Assessment

- Detailed guidance issued on May 1, 2015
- Responses due on July 1, 2015
- Only include information for existing service levels or new services associated with committed projects
- New services to address crowding or planned expansions of service should be submitted through the Call for Projects
- Inflation assumptions
- Year of Expenditure \$
- Enter information by mode
- Excel template



# TRANSIT OPERATING NEEDS ASSESSMENT

## SERVICE LEVELS

Operator Name:											
Contact Name:											
E-Mail:											
Phone:											
Date Submitted:											

	Upcoming Year	Short Range Projections									
		Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
		FY 16	FY 17	FY 18	FY 19	FY 20	FY 21	FY 22	FY 23	FY 24	FY 25
<b>I. EXISTING SERVICE LEVELS</b> (in revenue vehicle hours)											
Motor Bus											
Trolley Bus											
Cable Car											
Light Rail											
Heavy Rail											
Ferry											
Paratransit											
<i>TOTAL EXISTING SERVICE LEVELS</i>											
<b>II. PLANNED CHANGES IN SERVICE LEVELS</b> (in revenue vehicle hours)											
Motor Bus											
Motor Bus Project 1	0	0	0	0	0	0	0	0	0	0	0
Motor Bus Project 2	0	0	0	0	0	0	0	0	0	0	0
Motor Bus Project 3	0	0	0	0	0	0	0	0	0	0	0
Motor Bus Project 4	0	0	0	0	0	0	0	0	0	0	0
Motor Bus Project 5	0	0	0	0	0	0	0	0	0	0	0
<i>Sub-Total Motor Bus Planned Changes</i>	0	0	0	0	0	0	0	0	0	0	0
Trolley Bus											
Trolley Bus Project 1	0	0	0	0	0	0	0	0	0	0	0
Trolley Bus Project 2	0	0	0	0	0	0	0	0	0	0	0
Trolley Bus Project 3	0	0	0	0	0	0	0	0	0	0	0
Trolley Bus Project 4	0	0	0	0	0	0	0	0	0	0	0
Trolley Bus Project 5	0	0	0	0	0	0	0	0	0	0	0
<i>Sub-Total Trolley Bus Planned Changes</i>	0	0	0	0	0	0	0	0	0	0	0

# TRANSIT OPERATING NEEDS ASSESSMENT

## COSTS-EXISTING

Operator Name:											
Contact Name:											
E-Mail:											
Phone:											
Date Submitted:											
	Last Audited Year	Inflation Assumption	Inflation Assumption	Current Year	Upcoming Year	Short Range Projections					
	FY 14	FY 17-26	FY 27-40	FY 15	FY 16	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
						FY 17	FY 18	FY 19	FY 20	FY 21	FY 22
<b>I. OPERATING EXPENSES BY MODE (dollar amounts in thousands)</b>											
<b>MOTOR BUS</b>											
<b>FUNCTIONAL CLASS</b>											
Vehicle Operations				0	0	0	0	0	0	0	0
Vehicle Maintenance				0	0	0	0	0	0	0	0
Non-Vehicle Maintenance				0	0	0	0	0	0	0	0
General Administration				0	0	0	0	0	0	0	0
Other Expenses				0	0	0	0	0	0	0	0
Sub-Total Operating Expenses - Functional Class	0			0	0	0	0	0	0	0	0
<b>OBJECT CLASS</b>											
Employee Salaries				0	0	0	0	0	0	0	0
Fringe Benefits				0	0	0	0	0	0	0	0
Services				0	0	0	0	0	0	0	0
Fuel and Lubricants				0	0	0	0	0	0	0	0
Tires and Tubes				0	0	0	0	0	0	0	0
Other Materials and Supplies				0	0	0	0	0	0	0	0
Utilities, Propulsion Power				0	0	0	0	0	0	0	0
Utilities, Other				0	0	0	0	0	0	0	0
Casualty and Liability				0	0	0	0	0	0	0	0
Purchased Transportation				0	0	0	0	0	0	0	0
Interest Expense				0	0	0	0	0	0	0	0
Leases and Rentals				0	0	0	0	0	0	0	0
Other Expenses				0	0	0	0	0	0	0	0
Sub-Total Operating Expenses - Object Class	0			0	0	0	0	0	0	0	0
<b>CUSTOMIZED (List each item.)</b>											
Line Item 1				0	0	0	0	0	0	0	0
Line Item 2				0	0	0	0	0	0	0	0
Line Item 3				0	0	0	0	0	0	0	0
Line Item 4				0	0	0	0	0	0	0	0
Line Item 5				0	0	0	0	0	0	0	0
Line Item 6				0	0	0	0	0	0	0	0
Line Item 7				0	0	0	0	0	0	0	0
Sub-Total Operating Expenses - Customized	0			0	0	0	0	0	0	0	0
Operating Expenses - Existing - Motor Bus	0			0	0	0	0	0	0	0	0

# TRANSIT OPERATING NEEDS ASSESSMENT

## COSTS-PLANNED

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Operator Name:											
Contact Name:											
E-Mail:											
Phone:											
Date Submitted:											
	Last Audited Year	Operations Cost Inflation Assumption FY 17-26	Operations Cost Inflation Assumption FY 27-40	Current Year	Upcoming Year	Short Range Projections					
	FY 14			FY 15	FY 16	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
						FY 17	FY 18	FY 19	FY 20	FY 21	FY 22
<b>MOTOR BUS</b> (dollar amounts in thousands)											
<b>Motor Bus Project 1</b>											
FUNCTIONAL CLASS											
Vehicle Operations				0	0	0	0	0	0	0	0
Vehicle Maintenance				0	0	0	0	0	0	0	0
Non-Vehicle Maintenance				0	0	0	0	0	0	0	0
General Administration				0	0	0	0	0	0	0	0
Other Expenses				0	0	0	0	0	0	0	0
Sub-Total Operating Expenses - Functional Class				0	0	0	0	0	0	0	0
CUSTOMIZED (List each item.)											
Line Item 1				0	0	0	0	0	0	0	0
Line Item 2				0	0	0	0	0	0	0	0
Line Item 3				0	0	0	0	0	0	0	0
Line Item 4				0	0	0	0	0	0	0	0
Line Item 5				0	0	0	0	0	0	0	0
Sub-Total Operating Expenses - Customized				0	0	0	0	0	0	0	0
Sub-Total Operating Expenses - Project 1 - Motor Bus	0			0	0	0	0	0	0	0	0
<b>Motor Bus Project 2</b>											
FUNCTIONAL CLASS											
Vehicle Operations				0	0	0	0	0	0	0	0
Vehicle Maintenance				0	0	0	0	0	0	0	0
Non-Vehicle Maintenance				0	0	0	0	0	0	0	0
General Administration				0	0	0	0	0	0	0	0
Other Expenses				0	0	0	0	0	0	0	0
Sub-Total Operating Expenses - Functional Class				0	0	0	0	0	0	0	0
CUSTOMIZED (List each item.)											
Line Item 1				0	0	0	0	0	0	0	0
Line Item 2				0	0	0	0	0	0	0	0
Line Item 3				0	0	0	0	0	0	0	0
Line Item 4				0	0	0	0	0	0	0	0
Line Item 5				0	0	0	0	0	0	0	0
Sub-Total Operating Expenses - Customized				0	0	0	0	0	0	0	0
Sub-Total Operating Expenses - Project 2 - Motor Bus	0			0	0	0	0	0	0	0	0

# TRANSIT OPERATING NEEDS ASSESSMENT

## REVENUES

Operator Name:											
Contact Name:											
E-Mail:											
Phone:											
Date Submitted:											

	Last Audited Year	Revenue Inflation Assumption	Revenue Inflation Assumption	Current Year	Upcoming Year	Short Range Projections					
	FY 14	FY 17-26	FY 27-40	FY 15	FY 16	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
	FY 14	FY 17-26	FY 27-40	FY 15	FY 16	FY 17	FY 18	FY 19	FY 20	FY 21	FY 22
<b>I. EXISTING SERVICE LEVEL</b> (dollar amounts in thousands)											
<b>REVENUE FROM OPERATIONS</b>											
<b>Fare Revenue</b>											
Motor Bus				0	0	0	0	0	0	0	0
Trolley Bus				0	0	0	0	0	0	0	0
Cable Car				0	0	0	0	0	0	0	0
Light Rail				0	0	0	0	0	0	0	0
Heavy Rail				0	0	0	0	0	0	0	0
Ferry				0	0	0	0	0	0	0	0
Paratransit				0	0	0	0	0	0	0	0
<b>Non-Fare Revenue (List each item.)</b>											
Non-Fare Revenue Item 1				0	0	0	0	0	0	0	0
Non-Fare Revenue Item 2				0	0	0	0	0	0	0	0
Non-Fare Revenue Item 3				0	0	0	0	0	0	0	0
Non-Fare Revenue Item 4				0	0	0	0	0	0	0	0
Non-Fare Revenue Item 5				0	0	0	0	0	0	0	0
Property Tax				0	0	0	0	0	0	0	0
County Sales Tax				0	0	0	0	0	0	0	0
<b>Other (List each item.)</b>											
Other Revenue Item 1				0	0	0	0	0	0	0	0
Other Revenue Item 2				0	0	0	0	0	0	0	0
Other Revenue Item 3				0	0	0	0	0	0	0	0
Other Revenue Item 4				0	0	0	0	0	0	0	0
Other Revenue Item 5				0	0	0	0	0	0	0	0
<b>Sub-Total Fare Revenue</b>	0			0	0	0	0	0	0	0	0
<b>Sub-Total Other Revenue</b>	0			0	0	0	0	0	0	0	0
<b>Sub-Total Revenue - Existing</b>	0			0	0	0	0	0	0	0	0
<b>II. PLANNED CHANGES IN SERVICE LEVELS</b> (dollar amounts in thousands)											
<b>MOTOR BUS</b>											
<b>Motor Bus Project 1</b>											
Estimated Fare Revenue				0	0	0	0	0	0	0	0
Estimated Other Revenue				0	0	0	0	0	0	0	0
<b>Motor Bus Project 2</b>											
Estimated Fare Revenue				0	0	0	0	0	0	0	0
Estimated Other Revenue				0	0	0	0	0	0	0	0



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# Regional Transit Capital Inventory Live Demonstration



## WHAT IS THE RTCI?

- The Regional Transit Capital Inventory (RTCI) is a comprehensive database that contains information about Bay Area transit assets.
  - Covers asset type, quantity, year in service, and cost
- Includes all types of assets from **bus stop signage and wheel washers** to **heavy rail vehicles and BART Stations**.
- System created and maintained by MTC, data provided by partner transit operators.

## WHAT IS THE RTCI USED FOR?

### **Primary MTC Use:**

- RTP Needs Analysis and Projections

### **Other Uses:**

- Analysis for funding programs or related questions
- RTCI data can be exported for use in TERM Lite from the website.

# TRANSIT CAPITAL ASSET NEEDS ASSESSMENT

## SCHEDULE

Date	Activities
<i>April 2015 (done)</i>	<ul style="list-style-type: none"> <li><i>RTCI Web App Account Set up</i></li> <li><i>Cleaned 2011 Data file ready</i></li> </ul>
<i>May 1, 2015 (done)</i>	<ul style="list-style-type: none"> <li><i>Release Transit Capital Asset Inventory Update</i></li> </ul>
May 5 – 18, 2015 (now)	<ul style="list-style-type: none"> <li><i>May 5<sup>th</sup> Webinar (Done. Recording available at <a href="http://mtcdrive.box.com/rtci">http://mtcdrive.box.com/rtci</a> )</i></li> <li><i>MTC/ CH2M phone outreach (Ongoing)</i></li> <li><i>May 18<sup>th</sup> PTAC Meeting training (Now)</i></li> </ul>
May/June	<ul style="list-style-type: none"> <li>MTC Q&amp;A Sessions around the region; We come to you.</li> <li>Central Bay: May 27<sup>th</sup>, North Bay: May 28<sup>th</sup>, South Bay: May 29<sup>th</sup></li> </ul>
July 1, 2015	<ul style="list-style-type: none"> <li>Operators upload final inventory files</li> </ul>
July/August 2015	<ul style="list-style-type: none"> <li>MTC/Consultant review of data</li> <li>Operators to address questions and data revisions</li> </ul>
Sept-Nov 2015	<ul style="list-style-type: none"> <li>TERM Lite Analysis/ Draft Needs Assessment Analysis for RTP</li> </ul>
December 2015	<ul style="list-style-type: none"> <li>Final Needs Assessment Analysis for RTP</li> </ul>

- **Update/modify existing asset records**
  - Inventory based on 2011 data
  - Review existing information, correct if needed
  - Add missing information
  - Address MTC identified questions
  - Update current status of assets
- **Add assets to RTCI database**
  - New (planned to be in service by June 30, 2017)
  - Missing
- **Retire assets by changing asset status**

- Question and Answer Sessions around the Bay Area
  - **RSVP at:** <https://goo.gl/V8j2Vp> (Case sensitive)
  - **May 27<sup>th</sup> (Central Bay)**
    - BART, 10am to 12pm
    - SFMTA, 2pm to 4pm
  - **May 28<sup>th</sup> (North Bay)**
    - FAST, 10am to 12pm
    - Petaluma, 2pm to 4pm
  - **May 29<sup>th</sup> (South Bay)**
    - VTA, 10am to 12pm
- Materials/ Resources
  - Memo emailed May 1
  - Online Manual and Web Resources

Bring your questions and  
data issues to us!

RSVP Now by scanning:



*Note: You will need to access all three of these resources to complete your RTCI Update.*

- RTCI Web Application – Used for downloading and uploading RTCI data.
  - **Link:** <http://rtci.mtc.ca.gov>
- RTCI Public Reference Folder – Contains RTCI documentation and reference materials.
  - **Link:** <http://mtcdrive.box.com/rtci>
- RTCI Agency Specific Folder – Contains agency specific files and materials.
  - **Link:** *Provided to each agency's primary contact via Email.*

# Demo



## Contacts

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Plan Bay Area 2040 Project Manager

*Project Update and Call for Projects*

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# Thank You